PX-170

11/30

s█████ return to office policy?

insider risk

dr d████/dei

      doing better on black+ , women , recruiting, retnetion, wrt google

      worse on latinx/native american

news

12/3

ads- addtl exercise . j████ + p████

mitby: 1000 apps use 300 of them….how to make that easy to find/access
- incremental
- moar deeplinks/appify

reengagement / appify / deeplinking

play pass - how to invest
- originals
- evolve

v█████
- declines (PITA pm - m███ w█████? disappointed no spot bonus)
  - what is/is not payments data
  - decline reasons
  - messaging, changing billing dates….
    - -12% on starz

m█████ - process for managing deps between us/payments

12/9

s█████
- 0% is currently riot-starting in team, meme of impossible to police.
- either way, who is eligible is the crux. we dont have the kyc needed to a good job. dont even know if it'll be enough (apple associated accounts)
- we probably need IDV, background checks etc.
- hbo asia
- hotstar, wholly owned sub of disney

- constrained by SMB focus. e.g. large dev incentives can serve as discincentive for some of this bad behavior

SQEX builds a spin off tomorrow and licenses some of their IP to this new company, will we fo to war?

https://docs.google.com/document/d/15FjuVbrMiuU-aGHGJjfB7Cxm8A6lrQHtZPz0-ZFFYvY/edit?resourcekey=0-xaao4FXiwuMBXUscsJi5bw

comp
- comp plan - 3.6M
- 450 base
- 525 bonus
- 2.6M equity
- cash flow: 3.3M

announce, retroactive to jan1

prioritize 99% don't pay full
ok w janky rebate approach
"savings to date"
'independent' - ok w hbo asia
? talk to developers….get their instinct (sqenix example)?
- try o draft off apple draconian practices, if any
- if they're applying, it could be really hard/angering small devs

99% is the message that landed well, but will it sustain as program rolls out

lock in something with finance so they're expecting it. might be matching apple, might be more, might be less (may or may not fly)
make sure s███ aligned on plan and options and how we go to r██ (v easy for s████ to IM)
already communikcated it to r██/p████
how do you want ot earmark, how might this affect optics of play plan?
governance - pricing team needs to be involved
c█████ - how to get 'approval'/ set expectations

1. **ok to delay an announce** until we see how apple actually administers the program and what dev agitation may arise. *[assuming there isn't burning pressure from pr/gapp/dev agitation to do something to match apple]*
2. **we should also do research with developers** to understand how or whether they'd try to do the 'create shell company, license IP to it, launch new app' routine with apple.

3. **we need to set expectations with r▉▉/p▉▉▉▉. s▉▉▉▉** has pinged them and planted the seed. **we should work with c▉▉▉▉▉ and s▉▉** to ensure they're aligned with what (any) plan might look like (e.g. this is how much it would cost to match apple, this is what B and C might cost), and figure out how we 'earmark' the costs
   a. should consider if/how this affects the optics of the play plan
   b. governance: understand pricing team may need to be brought in
4. other random s▉▉▉▉ feedback/notes:
   a. would prioritize the '99% don't pay full 30%' message, over 'paying 0%'
   b. would be ok with a janky rebate approach, if it helps address T&S concerns. could have a 'rebate earned to-date' type thing in console
   c. need to get aligned on what devs would or would not be in the program. what ownership structure is ok, etc?
   d.

payments team
- talked options
    - converge
        - issues: who owns, play sufficient control?
        -
    - status quo
        - ngbf, but need needed to created deconstructed bf for us, because we only use some
    - get out of buy flows altogether

b▉ ready
s▉▉▉ s▉▉▉ - will go w shopping
left w yt , ads, google store

status quo works for us
- if yuo can deemphasize shopping or YT, put it into optimization
    - processing, fops, risk,
- we could take web for digital
    - ios flows
    - ads, cloud

- to retain talent and have enough data
  - everyone will go to apis
  - who wants to do ios
- to bundle

deals
rakuten sourcing/aggregating

? escalation / c████ / p███
- solve fragmented buy flows
-
- will happen next week
- shopping - pls maintain api for 1 more yr.

S███████
- play pass t mo tuesday

  - app squad wtf, camera?

unity

----

gpay - IDV
clover
s███ piracy
app squad
align w mmh on org and culture changes
idfa CY
deals prioritization

org
fix okrs

20210105

DECISIONS/DONE
- dei okrs
- Advanced protection OK?
    - half of play pass not in it.
- read up on potassium
- organize around gnosis
  https://gnosis.googleplex.com/p/ahNzfmdvb2dsZS5jb206Z25vc2lzchQLEgdQcm9qZWN0
  0GICAglihuYkKDA
-

play leads
2441

2695
s█████
- what does potassium really mean? eliminate cookies, protect ads
- what should my role be - resourcing?
- k████
    - exec presence
    - ability to drive this big complex thing
    - paradigm shift? from drive/comms to this?
    - potential backfill for my team
    - team fit, xfn influence
- ? pf███
- android : headed to on-device measurement / tracking
3048

p█████
- s███ feedback….how to operate
- kyc / developers
    - indians, covid, job loss
        - loan apps shady, aggressive collections.
        - needed RBI license
        - hard to see APR due to escalation
        -

pb
- supercell, 100M -> 15%
- apple ok w sku parity (we could enforce via gvp)
- runway
- raising money eom jan.
- FT jan

- HT feb
- start masterclass 1/march
- store - autopilot for 6 monts….
    - new ranking for games
    - deals, mekka, hc
- a███ - good place, stepped up
- d████ needs to build relatinoshi0ps
    - y████
    - pf
- gmscore
    - pm/eng issues
    - d██████
- runway
    - needed more a██/k██...thinking abt the small devs
    - mmh - thought they'd be too easy on devs
    - implementation mtg
    - india mtg
- EU legis
    - a███?
- get someone for a███, 1 person for k█████/m█████
- free 1-200M
    - post-install x-sell, more ads, less organic
    - search page, depth ads
    - deals
- msft
- tablets
    - more ammo to care about large screen
- b*

6024

s██████/play leads
- 'very good' for play....~350, without XFN, without extend
- plan for 80% (at lower end)
- some may be granted late in year, details
- YT
    - h█████ / s█████
    - 'so much work', nothing of substance. talked to s█████.

20210106
DECISIONS/DONE
- **CSM -> m████, privacy**

- **briefed a███ on pb sitch**
- **saw rubidium, t&s updates**

devexp
- privacy
- kyc

rubidium
- who is the director to rally and focus

s███████
- org/culture
  - reorg, people coming loose.
- pb
- 100M cushion
- app squad 1P focus
- fitbit sub lead
- hc
  - 350 to play, epuc/bd,
  - caveats
    - 45 - allocated to extend location
    - 25 - give back to d███. can probably fund the rest of the 60 himself
    - 20% holdback release in october
    - rate card, can trade heads for location
  - complexities
    - negatives we've been carrying
  - gmscore - slated for 22, under the extend
  - unicorn - j██
  - dont know what happened to yt heads

20210107

runway
rubidium
clover
EU new deal
unicorn

- k▮▮▮▮
    - exec presence
    - ability to drive this big complex thing
    - paradigm shift? from drive/comms to this?
    - potential backfill for my team
    - team fit, xfn influence

20210111
DECISIONS/DONE
- review hwgpw
- advised pk
- updated leads on stuffs
-
xfn
- pf, AM conscripted into dsa/dma
    - dsa - moderation
    - dma - p2b 2.0
    - new deal - consumer protection

cultural shift doc

PK 1:1
- ios squad
- PM, mktg, comms, 'central team'
- ? working w m▮▮▮'s team?
- uer to figure out why not engaging w G products . e.g. security w/faceid, multi app use cases
- ? how are 1P teams orged wrt ios vs android
    - much smaller?
    - teams were too NIH. wouldn't use apple's libs
    - much more constrained : easier to dev for….make that 1 way better, rather than giving ppl 10 ways to do it
    -
- contributing some teams
    - search - well staffed, corralling
    - tasks - 1 ios dev, get any help they can get
- apple - only 1 enterprise acct
    -
- 10 ppl CT - 8 eng 1 ux 1 pm
    - trying to id people who would work in a platform capacity
    - comms, pr, mktg
    - catch product teams output
    - needed incentives, company level OKR
- still no exec level view of what we want to do on the platform, no exec sponsor

- e.g. dealing w privacy nutrition label
-

20210112
TODO
- s█████ / hgpw

app quality
- pixel ux
- ios generally more polished
- more effortless across form factors

a█████
- not as forward as m, gh
- shadow of pb
-

s██████
- jalwa 15 for line 10
- some given away to wear, maybe.
- stadia - fertile recruiting
- j██
    - worried we need full time person
    - p████ nog good at brining people together and getting them over hump
    - `

m████████
- buyflow
    - k██ - getting beat up by bill ready
    - v█████/c██████/b██ (?) -> p████ to make call
    - b██: going to force all physical goods stuff to their other buyflow
    - 3 options
        - support deconstructed only
        - b██ should handle all physical, play should handle all digital
            - g1?
        - single consolidated flow across all of google
    - gpay logo. caesar told stop. thought it was only india. we thought global
    - restitution ph 1 - current, ph 2 - new cases. ph2 not on track. kftc pressure
    - trade off br comp vs restitution
    - not enough vis to understand tradeoffs

20210115
h██████
play pass funding
gc, fop ownership. XXX doug
big nums, 1M ppass. subs 100M

42eng years disingenuous, and play would have to take that cost and put billions at risk

s█████
d█████
- stress for android
- c████████ can't deal with him
- creating some issues out of non issues. or adding complexity
- XXX name drops s█████/escalate to s█████ too quickly….is there some fomo?
    - bring to s████/t███ first
    - wasting time talking him down
- lot of shit talking….shit talk abt s████ to c█████████. shit talk l████ to c█████████.
- you 4 run incremental
    - d██████, l████, c███████████, r████
- felt microed, so s█████/a█████ disengaged.
- gmscore/play sync - 20 ppl in room.
    - ed proposal for 3rd party stores
    - ejc does not fuck around. told to talk to a███/d██████
        - d██████: ejc not solving problem. throwing ppl under bus
        -
v███ going to leave
- c████████████: d██████ rubbing off on v███

mmh
- pm's having trouble w m█████?

https://docs.google.com/document/d/1O_imfkvktVnOUYZGm4Y5sKkiiTy2L_bx_vekfxt_eYU/edit?ts=6001e875#heading=h.3ujjs2gsnr1n

20210119
- thx for making time
- huge thx to teh teams working behind scenes to distill into 10 slides.
- put landability aside
- focusing on principles first

- legal advice
- discussion is complicated and easy to get derailed. we had a structure in mind so we're going to try to adhere to that.
- only 10 slides of dense info

20210120
inauguration day

s█████
- d█████ et al
- see issues first hand
- strat roadshow w s█████/s█████
- cros update

- tablet
    - XXX DEBUG OHANA , DUMBLEDORE, B* ASK
- hc
    - s████ +9

perpetually positive

runway/sr leadership
- transparency as principle
- CN app store approach...50% for discovery etc
- s█████
    - existential issue: will this stop anyone from complaining
    - need to have billing optionality
    - like more transparency. what is the way this would be explained to world
        - integration requirements stay? or is everyone in?
        - making people pay that weren't paying
        - do we need more enemies? only 125?
        - misaligns us w devs
        - dev fee can be levied
            - hobby developer license
            - tiers of support
        - very google - rational, cerebral, legislators/regulators need bitesized takeaway
- j█████
    - the one comment I'd add -- to S█████'s points -- is that what we believe about the likelihood of being required to offer choice of billing system seems fundamental to the direction we choose here. I hadn't heard until today that we believe that;s a highly likely outcome.

d█████
- strategy
- runway
- clover

spotify/s██████
- new agreement, might cost more
- not necessarily more commit
- tk wants more $, GM negative
- s████: existing deal may have to open
- not just more cloud spend to save $ on play?

store process
- 2 teams own
- walk up chain to get guidance
- working on different goals - ipd / interstitial rate
- not enough escalations

clover/s██████
- status...b*

runway/s██████
- ? bulk
- step back, pressures, kr,
  - need perspective / game plan on whether or not proactively before apple is a good idea, waiting till regulatory/bitter end, know what we want/particular event
  - gametheory
  - shopping -angry, defend, instinct to fight. remedies were lame (not really solving the problem, trying to give the least). until clear it wasn't work.   not clear what counterfactual is
  - nothing yet to make majority to stop agitation
    - dynamic w apple....divert firepower, but is the collateral damage going to hurt us?
  - j████: was it a menu.....make it a **recommendation by doing scenario planning**
    - we're focused on regulatory...but what about competitive....if we hold line too long
      - if you push tencent, ramping their store, ilke etc, join up w samsung
  - if we did everything tmw, what would epic's response be, supercell etc
  - rate card - impact on ecosystem, who gets riled up, new enemies
- epic going to continue, ags, dma
  - choice of billing will continue as a vector
- 20% narrative
  - soundbite
  - ags/epic/eu - meh?

- is it worthwhile doing up front
- how to integrate j███'s team. without pissing current team off.

samsung/wear
- wear addendum in samsung deal
- wearables app
    - merchandizing for watch apps and watch faces from galaxy store
    - categories
    - entertainment carousel 20 curated
    - need apis from play
        - m█████
- need public api
    - 'can be curated' -tooling to populate the carousel

j█████

s██████/cl
- emu
- storex
- better together
- commercials

pb
- t██████ - ATC betw h██████ + m██████
- debug 2 pager games vision. w g██h█
- d██████ - s████████
    - pms under him being too territorial/dictatorial
    -
- OKR review
    - 'my business requirement'
        - authoritative influence approach. doesn't want to convince engineers
        -
    - incremental review w s██████
    - GTM fighting over 50 vs 500
- distribution - not allowed to say no
    - 10-ish

pk
- focus on regulators - defend or make peace ?
- you got a business idea, we have a business model for you. we want you to be successful
    - dont simplify, be comprehensive
- stores - as a nother dimension

s█████
- play store for wear

AGG review
? how to for load times. journey for debugging perf, etc

s█████ passdowns
s█████
whatsapp
privacy
nutrition labels, ATT
thoughtful approach, but apple more aggressive

better together importance
- e██. bluetooth, everything that would be common in all the better together scenarios

pf
- risk hc
- compliance hc ask - heard it was granted, but█████ F claims not to have received.
-
-

go/play-loyalty-datasite

d███████
- a███ took on scope and then...

runway
- not clear billiing option viable

FEB

a█m
- over index on impact/numerical impact.
- focus on KSAs.
- bias to execution rather than strategy

mainline
- android: op pain. not staffed for operations pain
    - first place to collab, release tooling & operations
- graduating code from gcore to framework
- mainline focus on aosp
- gcore focus on 1p dev velocity
- what to combine
- d█████ adversarial on hc…'then we'll have to ask'
- a████ speaking on behalf of london? london annoyed at s████?

s██████
passdowns
- s
    - dramatically improve privacy narrative
    - big narrative at io
    - potassium, assistant, privacy nutrition labels
    - robinhood, how stuff rolls out/fans out/butterfly effect. if not careful, always in any cycle related to online svcs
    -
- better together, phone + watch
- dei
- m██ joining s█████'s team
- feb 9 – s█████/g██ updating on silk

- feb 16th - roundtable type thing

wear - slsi, faster than tizen, smooth,

k█████

- redone all content in store, all formats, all surfaces, just about everything that's not ranking
- gets more value out of existing real estate
- created app hero card, used less pixels, more effective

alignment

- 65 execs, aligning on company vision and okrs
- 5 days. 2.5 days was actually focused on mindfulness
    - mindfulness
        - listening, being empty
    - language
    - trust
        - rackets

n█████

- collab/perspectives

2/8

s█

- s████/c████████ not aligned with lower levels
- 'asks' vs collab problem solving
    - how to work as one team
- trust has been hurt

- aiai, sandboxed app, hotword processing
  - android told aiai to move stuff out of gmscore
  - feel like trying tobe played

2/9

passdowns

- ~60 mins assistant review
- 60 mins pixel review w s████/h████/r██ last thursday
- s████ said @ gleads ....recap, v well done, excited, great review
  - pixel android 2021
  - what are the spaces on the mobile phone going forward
  - assistant
    - voice strategy
    - gboard dictation ++++++ responsiveness, grammar, punctuation, gmail, warm words (stopping alarms, from lcokscreen etc)
  - smartspace
    - at a glance (next mtg etc)
    - positioning as what assistant thinks you should be doing right now....postit right in front of you
    - at starbucks - loyalty card, at airport - boarding pass etc
- silk/material next
  - leak. partner. out of date, inflight
  - silk - make android modern & reliable. color themeing, ssytem spaces.
    - visual ssytem , IA update to all spaces
    - everything is getting an update
  - material next
    - systematicization of that
    - more app side
  - fewer jumpcuts
  - 4 core spaces
    - quick access
    - attention

- smartspace vs notifications. help you based on context. extension of notifications
  - yours
    - home screen. your mess
  - everything
    - all apps. search. sortable/filterable. when in doubt go here. 1 index
    -
  - coarse gestures

2/10

s█████

- feedback on the ux session
  - headed in right direction
  - just need next level of detail to expose thorny issues
  - how will teams really make decision of what makes it onto the ux
  - will consumers understand it
  - runtime dialgos turnin ginto tos
- p████ mail
- family review. m████/p████/mmh/t███/r██
  - b██g████, j██, j██████, ss████, apps team council. accepted
  -
- material next challenges, sufficiently plugged in?
  - read in on jetpack
  -
- clover
  - 'no penalty', defensive move. THERE IS A PENALTY

j███r█

- GTM dates/reasons, branding
- need to do b* and clover
- hc
- yeah key points are (1) we need a hedge, and (2) we need TAM and can converge later
- HC is still an issue, but if we think some form of "fund out of ATL" or other bucket, then it's a credible option.

- gmscore
- 1) there is an overhead of this new platform, with new unique constraints (e.g. adding production monitoring, alerting, custom rollouts) to account for the new platform. given how different it is, we need to do something here for that or suffer samsung S21-esque bugs
- (also similar for mainline / "google play system updates")
- within gms there are two complexities...
- 2) the APIs in GMS presume a certain security model, which doesn't exist on any of our short terms solutions (is orthogonal to hyperv vs haxm). basics like not storing PII on device.
- we need to do a full security audit of all APIs w.r.t the short term security model and see how we could either modify (and accept risk) or disable apis
- and implications of that on app catalog
- 3) there is a massive amount of logistical work to ensure all teams who are building are qualifying their work on / considering the platform
- the long term solution with microsoft simplfiies this for us because we can provide much stronger security guarantees
- did that make sense?
- so to answer your q... it's not really a win10/win11 thing. its a "battlestar-esque security model" vs our nested virt security model
- nested virt requires msft to rehost windows on top of hyper-v (effectively depriviliging it)

- so it's a shitload of work for them
- (or equivalent other solutions)
- they are aligned that it's the right long term direction, but obv is a massive amount of work and is not feasible for their fall timeline
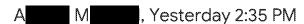
-

---- CLOVER HC —

T█ L█, Yesterday 2:33 PM

re:hc and doing B* and clover....i think we need to more clearly articulate, in the b* case, how much more hc needed, for how long, and why (TAM + tablet strategic value + revenue)

for clover, assuming we scrambled all the jets onto it, i'm unclear as to what the resourcing gaps are (sorry i don't have the latest decks if they're there), and for which teams (e.g. i'm pretty sure android is a big hole), and what the sequencing for MVP launch would look like

*resource sequencing for MVP launch

A█████ M██████, Yesterday 2:35 PM

What's the right forum to get signal on clover funding even without the backwards compatibility piece?

T█ L█, Yesterday 2:35 PM

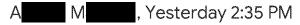j████ is going to raise the issue w s█████ tmw morning

A█████ M██████, Yesterday 2:35 PM

Sorry lag.

Ok sounds good

T█ L█, Yesterday 2:35 PM

but not sure he knows what the number is, or where the holes are (play vs android)

A█████ M██████, Yesterday 2:35 PM
For what needs funding on clover. We have imprecise ballparks
Would be helpful to get an envelope where we can apply heads and hold
some reserve to cover holes as we see them. I think our original estimates
are ballpark accurate

T███ L██, Yesterday 2:37 PM
(can you point me at those ballparks, i assume it was in last deck to h██████
somehwere, but i don't have that handy)

A█████ M██████, Yesterday 2:39 PM
It was ballpark 50 play + gms, 50 android os
The 100 is about right in total but the balance may shift

T███ L██, Yesterday 2:40 PM
sorry is that assuming we killed b* and abandoned win10?

A█████ M██████, Yesterday 2:40 PM
(we had other asks for better together features, developer tools,
asap/policy, etc)

T███ L██, Yesterday 2:40 PM
and what level of security model you think is implemented by october?

A█████ M██████, Yesterday 2:40 PM
Yes.
This assumes no back compat
I think the backcompat thing in parallel would be 30 ballpark on top of that.
The old estimates aren't probably accurate enough because they were high
level
Can put something together with more detail now that we've had convos
with them

T███ L██, Yesterday 2:41 PM

and you think 100 would make apps avail by october? (ie full android security model)

A█████ M█████, Yesterday 2:41 PM

Mainly would need to know what level of detail you are looking for
There is no path for us to have all apps available by October
That requires joint work on both sides that neither can commit to

T███ L██, Yesterday 2:42 PM

what level of security model would we accomplish by oct?

A█████ M█████, Yesterday 2:43 PM

We can have a beta by October on win 11 (hand picked apps + games), and scale up to the "long term" solution with microsoft
It would functionally be Battlestar

T███ L██, Yesterday 2:43 PM

is the limiting factor the android security model, or gms compat?

A█████ M█████, Yesterday 2:43 PM

In terms of security model it's roughly identical. The large Delta in scope is that we would need to figure out how to onboard Google Play services, take on deeper os integrations, and rearchitrct a bunch of stuff
It's a combination. The Android security model is a completely made up dependency so we could just arbitrarily decide to ignore it
The Google Play services one will be quite tough to get around. It's just a lot of work + risk
(also is tied to the same mental hurdles we would have to cross to relax our security requirements)

T███ L██, Yesterday 2:45 PM

the gmscore stuff is orthogonal to win 10/ win 11 right?

i'm assuming that choosing to rest andorid on hyperv impacts android, but not gmscore....pls correct if i'm misunderstanding

A████ M████, Yesterday 2:46 PM
I can at least take a closer stab at scoping out the work if it helps, but given how much scope we've uncovered in our convos
Sec getting to comp
GMS is more about security model and deployment model
1) there is an overhead of this new platform, with new unique constraints (e.g. adding production monitoring, alerting, custom rollouts) to account for the new platform. given how different it is, we need to do something here for that or suffer samsung S21-esque bugs
(also similar for mainline / "google play system updates")
within gms there are two complexities...
2) the APIs in GMS presume a certain security model, which doesn't exist on any of our short terms solutions (is orthogonal to hyperv vs haxm). basics like not storing PII on device.
we need to do a full security audit of all APIs w.r.t the short term security model and see how we could either modify (and accept risk) or disable apis and implications of that on app catalog
3) there is a massive amount of logistical work to ensure all teams who are building are qualifying their work on / considering the platform
the long term solution with microsoft simplfiies this for us because we can provide much stronger security guarantees
did that make sense?
so to answer your q... it's not really a win10/win11 thing. its a "battlestar-esque security model" vs our nested virt security model
nested virt requires msft to rehost windows on top of hyper-v (effectively depriviliging it)
so it's a shitload of work for them
(or equivalent other solutions)
they are aligned that it's the right long term direction, but obv is a massive amount of work and is not feasible for their fall timeline

T█ L█, Yesterday 2:53 PM
for my education - the b* security model - did we actually disable gmscore
apis or modify them specifically for b*?

A████ M████, Yesterday 2:53 PM
another basic example that came up that shows why things balloon in scope
we disabled them
we audited all games
looked at what apis they used
and then disabled the rest
(games notoriously have few gcore dependencies)
the reason i am advocating for an envelope approach is that if we're serious
about the project, we should make sure we have reserves to handle massive
bogeys
an example that came up yesterday --
the memory management model for windows and android is dramatically
different
android is greedy
so what happens in a case where say
you're using signal or what's app on your device
on your windows pc)
you close it, and then a notification comes in
either (without massive surgery) we have the VM running in the background
causing large overhead on the windows device, despite you having close all
android related stuff
or we disable things (background services don't run)
or we need to do some surgery
things like that

T█ L█, Yesterday 2:55 PM
or you install the signal desktop app

A█████ M██████, Yesterday 2:55 PM

ha ha

that example applies to all apps that use background services

~most apps in the catalog

▯

just illustrating the point

T███ L██, Yesterday 2:56 PM

yeah just being snarky

A█████ M██████, Yesterday 2:57 PM

i can enumerate a bunch of these if it helps bolster

T███ L██, Yesterday 2:58 PM

(trying to decide what it's worth to try to overload my brain on this)

A█████ M██████, Yesterday 2:59 PM

lol

T███ L██, Yesterday 2:59 PM

(as i listen to rubidium mtg)

A█████ M██████, Yesterday 2:59 PM

tldr, there are a bunch of examples like what i mentioned

ha ha

in general the thing i'm worried about is that we kind of need a blank check

on this

with some sense of what that upper bound is

i'd advocate for an approach like t his

we tell s██████ / h█████ this is ballpark what we need ceiling

we can come to advocate for 50hc blocks to unlock

or some such arrangement

T██ L██, Yesterday 3:00 PM
i get it....i dont think its realistic
scope is a massive lever for october
if all they care about is having tiktok, insta running by october as a beta, that
releases a lot of pressure on trying to find perfect (or even good) solutions
if you knew that for a fact, would/could you scale the ask down? (obvs i
wouldn't start negotiations there)

A██████ M██████, Yesterday 3:07 PM
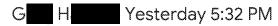(sec brb)

A██████ M██████, Yesterday 3:16 PM
back
that would be predicated on a few things
1) we'd need the developer to be willing, and to want to sign up knowing the
reduced security (would be a big deal for FB i assume -- especially allowing
FB login)
2) (also non-technical) we'd need to get the android security team on board
with it, they've historically been more challenging
3) a lot of the scope is coming from msft asking us to do integrations with
their stuff. unclear if we could negotiate them down off of that
(also relates to #4 which is a lot of the scope is around modifying system ui,
and constructs like notifications etc in android to adapt to windows
standards and feel native)
the current october scoping was always trying to find a passable solution
that is tailored to a set of partners we hand select
we were planning on being even more conservative than what you
mentioned... by identifying a set of apps that don't use very many gmscore
dependencies... aren't security sensitive... etc
and starting from that angle rather anchoring to a list microsoft wants. they
seemed OK with that approach but we haven't spoken in detail. also we
didn't tip our hand that GMSCore is not supported in b*... we couched the
whole discussion around security and left it at that

G██ H████ Yesterday 5:32 PM
my sense is we should probably write down a "what does both look like" and call out where there's efficiencies between B* (shared components) vs. the delta the Microsoft creates for Clover. then meet to discuss, recognizing that 50+ heads is unlikely to go anywhere, might be worth pushing on assumptions and see if the exercise yields somethingn aroudn 30-40 HC in 2021. is that a good next step? other thoughts?
(bottom line, I'm trying to avoid the Clover only deciision - I think it's crazy risky without a hedge)

A████ M█████, Yesterday 5:42 PM
I'm just confused what the plan in H████ and s█████'s head is

G██ H████, Yesterday 5:42 PM
moar product, less people!
I'm kidding

A████ M█████, Yesterday 5:43 PM
H████ wants to move forward - was he really thinking we could handle this from existing resourcing?
(not expecting an answer just asking the obvious question I want his feedback on)

XXX PWESTBRO is able to do a lot of the port...what changes...why is android involved

—
a██

s█████ come across not respectful. rude, condescending.
broader issue is blurriness, play/android remit boundary
- ppl like d█████ (and folks close to her) can be selective how that overlap
  is managed/applied. will have an opinion to block, or say it's not our
  thing and play will have to justify
- blocking tactics
- hard held positions on 'arguments around google not to be trusted'.
    - hard to argue with
- play dev - feel not so separate
    - app bundles, integrity not just a play thing...saying its a play thing
      pisses them off
    - j████/d████
    - appbundles, mandate signing model
        - d█████/d█████ uncomfortable w play signing everything
        - frustrating for feedback to come late
        - d████: 'this is a play decision, how play wants to distribute'
        - cutting off room for debate not viewed favorably
    - have to assume they're always decision makers.
        - slows things down
    -

‾‾

abuse

library - not TOO attractive & lucrative

runway factors
- distro fees
- billing choice (or not)

two reasons. first, some folks felt strongly that we should not have two store
experiences, but rather address less desirable content through surfacability

second -- related -- H█████ did not even like the idea of a difference in surfacability -- he wanted a single bar
I thought the bifurcated store idea was a good one, although I preferred the option we workshopped around limiting discovery (that is what I mean by surfacability -- I'm multitasking)

just concerned with the pandora's box of developers seeing that they are in the alley and not in the nice part of town

T██ L██, Yesterday 2:23 PM
double click?

A██ R█████, Yesterday 2:23 PM
today, we don't tell Devs how discoverable their app is in the Store
this will be very explicit
bad press cycle pending
for P2B this was a hot topic
which is why we took the approach we did

A██ R█████, 6:28 AM
what I propose is that we first confirm whether we are a store or an index. I feel we walk a middle ground today.

A██ R█████, 6:33 AM
index means we can take more out of the web search playbook (e.g. safe search) but it also means we'd probably want to change-up how the Store is structured, (I'd have to think more on what that could mean)
With a Store paradigm we take harder lines. Other Android 'stores' could pop-up to cater to niche areas that don't work with our policies

---

glance scaling outside of india, content, monet
60c arpu/yr, 50% w oem
liveops, deals,
cant scale to work w devs
?admob

----

what's not ok
- malware
- deceptive practices

w█████
- privacy
- competition
-

----

flipkart india tablet
p█████?

----

k██ - focus on 2nd purchase.
growth? strategy?
where is this happening and why can't i see it?

s█████

ar/fb

amzn/fb watches

geist

dei hiring at leadership levels

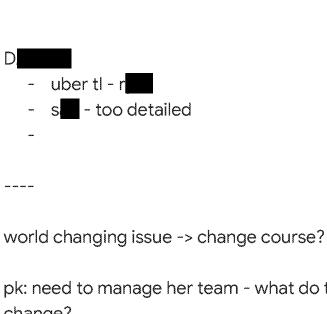   googlegeist

    overall ppt ratings up slightly

    D██ L████, 4 min

highlights: (1) biggest surprise on positive perf sentiment lift (despite everything) (2) feeling of connection/belonging up despite wfh, (3) well-being at an all-time low (but higher than the informal non-ggeist rating of this from back in April)

    D██ L████, 1 min

and finally, (4) way down on hierarchy/bureaucracy/getting things done (with notably v low scores by VPs/Dirs - perhaps being sandwiched and feeling it most profoundly; I can relate)

re the new future or work questions.... for questions asking which location (home/office/no pref) was best for which activity/attribute, e.g., connecting, well-being, concentrating, etc., mixed response across the 3 choices for many, indicating that this is a very personal/individually unique assessment, so Googlers expressing desire to have more say (and asking leadership for more trust) in ID'ing where/how they work best and achieve the most

I██

d███ / blizzard | g██ c██████

n████/opg

___

D█████
- uber tl - r████
- s██ - too detailed
-

----

world changing issue -> change course?

pk: need to manage her team - what do they say if things are going to change?
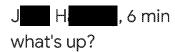ss : changing themes w every dev he talks to
- tencent: apple subsidizing w svcs

1) get clarity, on larger strategy
2) get certainty

—

ngbf

3Ps. doordash
what backend integrations expected. order/terms consistency?
subscriptions for 3Ps?
analytics available

—

h██████ feedback
T██ L██, 8 min
hey man, sorry for evening ping. low priority but lmk if you're there.

J█████ H███████, 6 min
what's up?

T███ L██, 4 min
(first off, sorry for diving right into rando work stuff, we should catch up normally sometime. with like alcohol. which i might start on right now given what a day i had). i know stuff's weird between play/youtube. but besides that, curious to know if you think p███ f███ is VP material from what you've seen.

J████ H███████, 3 min
no worries, and +1 to catching up over a drink.
I can tell you my experience with P███ has not been positive

T███ L██, 3 min
well, we're trying to get you to do stuff you absolutely dont want to do.

J████ H███████, 3 min
That's normal
It's the "how"
I haven't seen him trying to build bridges (and have the same criticism of E██ on my team)
With P███ it ends up feeling like he's trying to manipulate the situation
In striking contrast to A██████, who I see doing much more give and take

T███ L██, 1 min
yeah i know a██████ is trying a different take. what specifically felt manipulative to you, if you have an example?

J████ H███████, 1 min
Early on, what also seemed to happen was that the teams would talk and think they were on the same page about things; then P███ would present a

deck at an exec review (having not shared it with our team in advance) that said something else

The general theme of surprising our team with a deck they hadn't seen (or giving them access hours before a review) happened a few times

brb

T██ L██, Now

ok that's really valuable feedback. really appreciate it.

██ H█████, 17 min

back

So the end result is very little trust. Disagreement is fine and normal, but how it's handled is critical

Especially for VPs

As we're the ones expected to deal w/ these kinds of situations

T██ L██, 15 min

appreciate the feedback. not defending it, but it is a hairy situation, even our bosses have been kind of struggling.

J██ H█████, 14 min

Agreed

But I just compare to the quality of discussions I have with you, M██, and A█████

And P██ is not in that league

The way he comes across to our team is actively hurting the process, rather than helping

T██ L██, 13 min

lol to be fair we've been backseat driving and letting p██ take the heat

J██ H█████, 13 min

Which might be a good strategy for you all

But not doing him any favors

As a counterpoint, P█████ on my team has had lots of arguments w/ the Payments team
But has built really strong relationships and trust to manage through those which has really benefitted both teams, and gotten us through some really ugly problems purely on relationship

T██ L██, 12 min
right. ironically, p███ plays exactly the same role with payments for me with similar outcomes, last meeting with p████ notwithstanding.
i've put p██ in charge of our relationship with v█████/p███████
anyways, not trying to defend, just build empathy.
again your fb totally fair

J████ H██████, 10 min
I'm also being pretty blunt
I get that it's a tough situation, but again, my expectation for a VP would be they'd get through it with more understanding and good relationship w/ the team vs. just plowing through
For a 8/9: sure, take orders, march through, leave a mess but get it done
As I said, I have the same criticism of E██ on my team: he'll get things done but not making friends along the way, which will hurt him in the long run

J████ H██████, 2 min
gotta run - family dinner, but can chat more tomorrrow

T██ L██, 2 min
sorry was afk for a sec
go have a good dinner. lmk if you ever want to grab a drink!

—

j████ p██

https://grow.googleplex.com/role-
profile/detail/JSF_PEOPLE%2OPARTNERS,1456,1457

3/2
s██████

march 4 google-wide townhall
march 8 vps w 100%, autoshare

s██████ io.
focus on android ui change.
privacy g-wide
  - concept of 'safe sensing'.

march 12 - half day privacy summit
  - gapp - state of world, mktg shift narrative
  - s██████/s████/d███/sf██....

met w samsung. android share bad.
  - what is bigger more compelling consumer proposition....service layer.
    free/heavily discounted subs only on android
  - spending to have carriers promote android
  - what are compelling bundles. bumble, fitbit,

samsung fold. note fate.
  - switching factor

behind on hiring

msft. links.

S█████

tablet

- specific features to store…will ppl disappear
- merch, aquality, badging….
- devconsole? just nice to have?

dd███: raise round of funding?   wheres the data? adding to team without knowing were on the right path
supersize kids apps ? bd work?
how big is it going to be? going to be downloadable. whos the vision, are all the pieces going to be there to pull together.

long term plan for tablets.

whos lead? instead of taking orders

—

discord

- why stagnate in games?
- growth strat
- our games strat

—

GKS baseline 20k
to 2M

family positioning of tablet changes adoption
US: assistant device, lower

most new stuff is family oriented

not good fro distance learning

top 10: zoom + google meet

----

s█████
 store / deals
 update on s&d in store
reviews, robinhood
b*
play's io story.
playpass story?

Deals:
We have divided work into 5 work streams and have various owners driving
each:
1: Deals Strategy (K█████ with help from d███████ (growth), j██ (commerce),
and c████ (ads))
2: Overall Deals Tab Experience (K██████ & e█████ (UXD) and b████ (UXR))
3: Developer & Partner Story (PDC-LON)
4: Go-To-Market Strategy (Strat Ops - D█████)
5: Eng infra design (M███) The team is meeting for a design summit to bring
them all together next Friday and is planning a PPS to update on progress by
end of this month.

— a█

- launching aug, dovetail, super confusing
-

—

vp forum
- play prominence
- sustainable value creation
  - https://docs.google.com/document/d/1MwTOvjEtZ2Ls_ZnS3Rh2WxD6y5mUTY7ew3rX8cACW3E/edit?resourcekey=0-DVGG-acV1DlvMjhsGoOL4g#
  - focus on free cash flow
- central finance weigh across pa
  - but opp cost different
- managing hc. exchange rates

s█████ directs
s████, moderation, 25th
- alert to potential controversy
gleads. sundance launch. ads not using 3p cookies
- generally happy
- some influencers not onboard
- really complex...ppl dont understand floc etc.
- working on microsite
- need to simplify explanations
browser convos....privacy as feature....we try to make them built in/background, but we need to be more forward and make it clear how much we protect people
mozilla shield aninmating when it does something for you
need to take credit

no april fools

royal - insider risk. 2020 - was acls. 2021 + = movement of data and what we do with the data

new obligations for 1P apps to be included in RSA, if preloaded, must have tablet version of app). and a wearable app. new resources to support. no clue where this would report

DEI accountability

S███████/B*
- games as 12B
- mobile to desktop
- simplify story even further
- 5review game theory
- give breathing room
- break the play/android linkage? maybe touch on chromeos....we did chromeos....thats how this started.

m████
- hc
- a██ - amazing, really like working w him. can rely, super aligned.
  - he feels sidelined
  - k██ needs scope
  - t██ doing well. v hungry. needs to be patient. t██/k██ haggling over hc
  - d██/s██ top of stack.
  - y██ strong
- g██ - fine
- a██ - less.
- m████ - super close partnership
  - used to be so contentious, now super strong partnership

- d█████ - v positive so far. hands on. got access to dashboards, understand things end to end.
- dysfunction on execution
    - teams w clear names, clear metrics to optimize for
    - a█████ stuff really messy.
    - org by surfaces, form factors
    - core platform (b███. phonesky platform (t█████)
    - optimizing for money ads/iap in different orgs
    - optimizing for DAUs
        - personalization, ranking, quality
        - features - store, hype
            - santoro, slack, etc.
    - store utility
        - backup / restore
        - onboarding flows
        - my apps and games
        - search

mekka
- m███████: creating anti pm culture. calling l4 pms, with 'an issue with what you said'
- y██████....rearrange entire pps deck night before
- m█████/h███████ relationship
- 2nd hand all
- b4 2 tls, wouldn't listen to pms. eng would have their own roadmap, separate from pm.
    - not partnership
- pilot for iap top ups
    - j██ trying to work w p3 eng for pilot
    - pf: mekka reorging because j██ gave them work that they need to support
    - p3 was excited to support pilot.
    - m████ never came to m██████

-

----

calibration notes

team leadership
- double clicking into vision and spreading the gospel
- managed disbursement of hc
- covered for mmh where i could , took on his directs for regular 1:1s and tried to coach as best i could
- learning a lot about attempting to get p██ f██ to VP, now also trying to help a██████, p████, k██ get set up for VP promo
- worked on d█████
  - serious 'how' issues, many escalations within weeks of me taking over. ran a small 360 to assess the situation and delivered feedback. zero escalations since.
- promoted 2 new L8s
- moved PM to m█████
- onboarded L9 d██████

DEI
- personally drove hiring for 2 senior (L7, L9) URG talent
- Product inclusion exec sponsor
- GFS advisor for under represented founder startup
- continuing to sponsor/mentor URGs on my team (ml████, g███████, j███d█████, a██n█████, m███b██████, j██████k█████)

qb for
- runway - managed a lot of the early work in backchannels to ensure teams were pursuing the right leads, communicating it correctly upwards. as we converged i sat back to let k███/pf handle
- clover - similarly managed the product and technical conversations in back channel, but letting g████/a██████ shine here

- play-samsung - working with play team, android team and samsung to design an aligned play store plan, and staff it. the proposed plan is literally my product changes (to be finalized, of course)
- play-payments - work closely with PF/AZ while mmh was out to (a) give them more visibility (b) stickhandle through some tricky conversations on buy flows, including with p███ @
- real money gambling - finally went live, though not perfect. somewhat policy-bottlenecked. assigning one of my PMs almost full time to it to keep this moving. p██████ and i personally engaging with RMG developer community to formulate next wave of policy.
- blockchain investigation - with p██████ ran roundtables with blockchain luminaries/players such as d███ t████████ founders of tron, etc. to understand the space. ultimately decided not to invest here.

advisor to
- android games/graphics. katie has really taken this over and g███ is sufficiently ramped that i have stepped back
- play/stadia conversations (both the conversations at end of 2020, and the new business model conversations in 2021)
- yt/play rewards
    - YT to migrate to play infra for lootdrops. allows us to for e.g. quantify what happens to retention/engagement for viewers who take lootdrops.
-

___
gleads passdowns

3/16
runway
google economic impact
return to office

----

a█m

- pm projects -> more jr eng who wasn't free. could've been done but
  was delayed 2 months
- assignments of eng
- 5-6 promo layer
    - high consciousness of eng having product insight/influencing
      product direction
    - manifests as just challenging PM in not completely rational ways
- play-android relationship
    - always feels up to us to broker, no aircover from
      a██/t██/s█████
- overtly political discourse that dominates google. more focus on
  work, on less
- eggshells around the ux team. language is being policed

mmh - m████ working on reorg, asked a██ to be quiet until they'd shared w
VPs. m████ hadn't told her team, but he exposed it to his reports, comms
ended up going funkily to eng, and she had to backpedal.

- is a█████ partnering w d██████?

c███████

- subs platform
- close to systems design, architecture

- user facing

----

g███ rant

I provided feedback to D███ last time that I was pretty unhappy
Ug
Uh...
No one has asked me about his performance and I definitely would not be supportive of see based on my previous interactions
So whatever they are justifying should not include me
He just doesn't really operate like a director
I mean if D███ wants to support him that's fine I would just say cut my name out of the notes
My overall feedback is that he theoretically is the privacy lead for gmscore
I haven't really seen him at all and in the context of Apollo he kept trying to represent us externally without actually running things by GMS core product or eng
So we kept getting surprised
And we were a little lucky that he didn't paint us into a corner in the way that he publicly described how we did things
So in that capacity he has basically not really been existent as a GMS core privacy person
Which is why I would say just strike me from the feedback at this point
just discovered that the delphi's work in gmscore only covers one of the network stack implementations
so we have a massive blind spot there... they didn't push on module teams to adopt that
so we don't *really* understand our data usage
also for iccid and in general over the last two revisions of the platform they kept making changes that were good for privacy, but without running to ground ecosystem impact

T██ L██, Yesterday 7:36 PM
woudl you say g███ is a non-factor to gmscore?

A█████ M█████, Yesterday 7:36 PM
(this was s███'s pointing at me last time for feedback.. we cleaned up his shit a ton)
yes.
as the lead of gmscore i have seen him 0 times
rather
i, as the lead of gmscore, have seen him 0 times
i can ask r██ for feedback too but my understanding is that there really hasn't been any partnership

as another example, this whole dangerous permissions thing. s█████ is there. but g████ is not at all involved

it's about PII usage and consents..

b██████ / r████ / d███████ / s██ have been running it

my caveat is that i don't see his whole job. but for the part that he's supposed to be doing for me he's not there

if i was going to flag in your shoes

my q would be

can we get direct feedback from the people he is supporting

e.g. a█████

for the core project he's doing (android) not the side project (en)

T███ L██, Yesterday 7:40 PM
yeah tell me what r███ thinks before 10am tmw

A██████ M██████, Yesterday 7:40 PM
will do.

I also pingd a█████ for his take to at least give me a sense for if I'm off base

T███ L██, Yesterday 7:42 PM
hm. since i talked to you i think he got dropped to EE lol

A██████ M██████, Yesterday 7:50 PM

My gut was right

Lol

Per r█

"No feedback. He's been silent. About all I've seen him do wrt gmscore is hire two privacy engineers for our privacy team. He's been included in discussions that are peripheral - he's involved in Delphi, and in Rubidium, but neither are steering us. I tried getting him more involved in the permission policy that S█ basically wrote; but his level of involvement there was very low - if any."

A█████ M█████, Yesterday 8:01 PM

Also: He has contributed to the policies around what OEMs can do with APKs on the device, and trying to make sure that his proposal doesn't contradict what gmscore does; but even there I don't know what his contribution is vs "is involved".

A█████ M█████, Yesterday 8:12 PM

a████ gut checked with bdc and he described him as a low l8 at best

sounds like a fun calibration

i miss the xfn calibration. i actually found it useful

T██ L██, Yesterday 8:16 PM

the ladder looks weird. you sure we aren't just biased to eng/pm ladders?

A█████ M█████, Yesterday 8:17 PM

might be. i think the thing to flag is that he doesn't actually have feedback from people he's theoretically supporting or representing...

if he's claiming any credit for gmscore stuff, that seems weird since he's not involved at all with us

if he's claming credit for android stuff, feels weird that he'd get SEE without any feedback from the people who run android
..
(at a minimum s█████/a█████ who run the operating system)
the box of 8 i am curious about is this one:

----

delphi gap

Per r███
"No feedback. He's been silent. About all I've seen him do wrt gmscore is hire two privacy engineers for our privacy team. He's been included in discussions that are peripheral - he's involved in Delphi, and in Rubidium, but neither are steering us. I tried getting him more involved in the permission policy that S█ basically wrote; but his level of involvement there was very low - if any."

He has contributed to the policies around what OEMs can do with APKs on the device, and trying to make sure that his proposal doesn't contradict what gmscore does; but even there I don't know what his contribution is vs "is involved".

---- NATIVE
10yrs entreprenreur

1.5 yrs @ axon.....public safety / body worn cams
started company that pivoted to native
strategic design
cal desigh MBA

█████
lib arts vermont
#1 language learning school
4 yrs of italian, economics
no one speaks italian....

linguistic diverse team .....

private equity ......

travel around world.
airbnb, netflix
sales

met in 2013 in NY, roommate interview
adventurers at heart

lived in kr, middle east serve, germany, monolingual

??? google translate

testing
- 6-8 months.   ppl hacking language configs. to practice language they were trying to learn/losing.
- easy monet - practicing language while just chatting w practiced language
- rather than keyboard paring
    - autodetect language on fly
    - translate across all recipient languages simultaneously
    - 10k ppl.
    - analysis engine. 3 benchmarks -
        - get to contextual translation. rather than purely mahematical approach…..leveraging ML chips on new devices., how you codify speech…vernacular….translate intent & meaning across parties
    - confidence score of lang autodetect
    - quality score of translation
    - sentiment score
- pre-seed
    - nov 2019
    - private alphas / betas, march2020-dec, public beta
    - just starting fundraising
        - angels, maybe get a vc
    - GTM/customer base
    - small business innovation research program
        - innovative startups -> agencies…USAF…..dont dilute.
    - need about $500k
- built everything for 300k…..bootstrapped.
    - brought in 135k
    - s███/salesforce….bg in linguistics. helped connect to zendesk, globalizaiton/localization.
- applying to ycombinator
- mixpanel for front end analytics
- 500 ppl in public beta
    - 60/70 DAU, 4min engagement/day
- interviewing: like the native experience, need media sharing……

- driving deeply w communities
    - direct to channel invite
------

rmg
- easy thing for ios
- real user pain / state...have to clarify
- claws rigged?
- what is the next thing you are going to do?
- india - vouchers, sell in other apps
- does skillz need a license? does it have to be by geography?
    - not variable payout
    - fixed pay in
- how area they protecting users, e.g. when casinos stop when there are danger sign
- apple is arms length....how does apple treat them?
- supercell
    - need a license...how many are given?
    - ppl have to be motivated

geist
execution
- univision + meteors destroying the plans
- holding onto plans too much
- not enough funding for initiatives....deep debt
- speed - ability to make quicker decisions

NEED WORK TRACKING ON THE METEORS/SUSTAINED WORK
- p█████: conviction on top priorities
- AM: siloed list of priorities s████/s██████/play

s██████ passdowns
- gleads. wellbeing. geist fb. yt thinking of moving ot focus fridays.
    - cancel 'most' meetings
    - should figure out RTO before big recurring programs
    - should do one off things, but don't do anything that could calcify into a permanent position
- ratings / calibration
    - we have more EE+, dont use NI
    -
- net importer of VPs

glance
- ss
    - re-engagement
    - app install
    - economics?
    -

s█
- pf - 3:30 yelled
- i'm extremely frustrated
- not helpful
- make me feel like i screwed up everything
- in front of 5 other people
- yelling at asian women
- don't threaten the team when s█ not there
-

pf:

p██████ asked question : proactive enforcmeent. tpm on pcoop

s█: dont expect it. not part of standard menu.

20 minutes of lecture from shie

makes it like pf fucked up, not getting staffing for it. your program, what would you like to do

pf:pointed question "s█ i just have to say, i don understand why this is always my fault, we're in thsi together right'?. feels constantly lectured. you didnt do this. you owe me headcount. pb/k██ were able to get me hc.

s██: what do you expect me to do?

s██: you didnt know policy was going to change

tone issue

is policy enforcement really pf's problem. same w streaming policy hc ask.

-----

role

- entertainment - v█████ - go build his own startup
    - 700-800 ppl. pm eng ?ux
    - games, audio, sports, music
    - type of person: managed entertainment properties at scale. understand ent mkt. entrepreneurial spirit….look for opportunities to do new novel things that only fb can do
- mktplace - 10 yr vet went toceo/ancestry
    - run teams at scale
    - buy/sell platform
    - new strategy - shops. fb/msgr/ig….show up everywhere. groups,
    - plug commerce into rest of app

org
- connections - feed sharing
- communities - groups
- entertainment
- mktplc + commerce

want ppl to run fb app in collaborative fashion

what do you need this person to do
composition - strong leaders but lost excitement about going deep into market to find edge.

product objectives
success / metrics
- biz metrics
    - watch hrs
    - gaming - change strategy to do something unique
        - different metrics
    - big bets on audio - listening hrs, less interested in consumption, does it unlock new kinds of behaviors/social audio listening
    - video - not accomplishing ….just passively consuming
    - social differentiator. vision
- incrementality to fb app
misinformation
- whose responsibility

culture
what sort of person are you looking for , your best working relationships
- leader - adapt to what people need. spectrum of people.   very different kinds of good working relationships
    - mission : see magic in ppl, shine a light on it
- common thing: relationship that is direct, transparent, mutual trust

- coach

what have you learned from the interviews thus far
- surprisingly hard to find strong vision/POV
- need inspiring leaders
- liked: ppl who tend to demonstrate hae an idea that was contrary to mkt / ceo was saying- conviction
- consistent execution excellence
- credibility

what does the work look like
- what kind of work goes on in the silo, what are the dependencies to other parts of the company
- who's doing this work now?
- how much does m█ zoom in here

d█████
- strong opinion, not asking for feedback
- c██████: indifference. wounds are deep.
- everyone backing off and work not getting done
-

NATIVE
- pitch competition, rice , h?
- more chipping away
- USAF, SBIR program
- id use cases,
- pentagon penfet…..8 wk accelerator for fundraising

- consumer facing app….was driving hard there. API pilot programs
- usaf….ID product mkt fit. doubling down on govt agencies….id target customers
- willingness to pay
- monetization based on the hack of existing users
  - help them learn languages
  - landing page….waitlist
  - USAF - ph 1. 350k contracts. 6 month time frame, get into the agencies, define customer problems, how you would apply tech , propose MVP
    - find specific commanders
    - e.g. security detail, called ravens, secure aircraft on foreign airbases
    -
  - ph 2. 1.5M sign addtl contract agencies

? gcloud fedramp high

talent
- devops
- nn, linguistic pros
- sttr - work w

fundraising - 500k.

—

pps summaries

games -
https://docs.google.com/presentation/d/1146ZmYkaaExTSV_9TM6tc9bjgRcqPCi741mZG5zs88Y/edit#slide=id.g9f039f7ee6_0_369
- game dashboard progress, pretty awesome with one click youtube live streaming
    - and pixel 6 performance fixes
- gamecore (android game development kit) update
- cool new concepts for takeovers on details pages for liveops & events

play pass -
https://docs.google.com/presentation/d/1nfPL8paA_Do5YNgX1BipGSjqgFVZneVBIR7wUnSypSk/edit#slide=id.g728d6e36d4_3_267
- updates on global performance and product improvements
- global launches have generally been in line with expectations in terms of free2paid conversion and retention
- next waves will focus on IN, JP, ID, KR, each of which have different market needs/dynamics
- focus on IN, hope to launch in **may**

dev console sdk program-
https://docs.google.com/presentation/d/1m-ZNM7M4x4gWYcEtoKDpydAeJOwWkfjA3lW3ZpVySUg/edit#slide=id.gbd2a1c7c5f_0_2
- v1 launched in december 2020
- already have 24 SDK accounts opened, covering 68% of top ads sdks by installs
    - allows sdk owners to report versions as outdated, see metrics on install stats and crash rates
- discussion on proposal for 'public index' of sdks (very early, lots of controversial points)

lower priority for you

updating android/play data access policies for google 1P -
https://docs.google.com/presentation/d/1oTj4ei31_nsXz2egwOLRokcTGavOOvWinWpHbr3rpZs/edit#slide=id.g64b27372bf_0_66
- our principles seem to be good, some risks and tricky situations in process of being managed (e.g. magiceye, one google dashboard)

store personalization for games home-
https://docs.google.com/presentation/d/1lVmBBdOXhYqdxGlcDqlKY97nWAYe6dTKrz3y_y5CFpc/edit#slide=id.p
- covers smattering of topics, but most impactful is the new timespent 2.0 north star metric, which is far more correlated with long term retention

new store segmentation -
https://docs.google.com/presentation/d/1wsK0kFM2WBLKwDPGVldnzB2_kcQMsL1RygA_2ad3yzM/edit#slide=id.gb116af2712_1_323
- WIP, early take on research we ran last year to try to hone in on new key markets (e.g. ID) with a bent towards trying to understand level of mobile literacy

in-product user feedback -
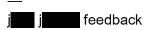https://docs.google.com/presentation/d/1clVWqpbLr1fyU6kqp08MchtXFTs1ySYliPZ-3Dwhucl/edit#slide=id.gbc95f539fe_1_22
- we want to start running surveys in phonesky to get direct feedback on quality of experience

—

Redacted - Privilege

Redacted - Privilege

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a███ notes

dont understand goal
too fast, hard to follow, too many pronouns
VO too verbose. and i think the key points were buried there and not on slide

—

j███ j████ feedback

req
build ecosystem
build vision, pull teams together across surfaces. think big and drive us in that direction

h█████

I worked with J███ awhile ago on a game streaming service for Xbox. Overall my impression was that he was **good at project management, business, and strategic maneuvering**. He was definitely **ambitious and good at managing up. Not very connected on the technical side.** Relying more on R██ T██ and myself to drive the development side of things. R██ worked quite closely with J███. R██ would have a good read on working with J███.

b██ s██

Yes, I knew him a bit. While we were building XBONE he has the GPM for Cloud Gaming. He's smart and pretty technical, but really **never had that much of a grasp for the business of cloud gaming or for game developer needs** (drove B██ nuts). Ultimately, he never made very much progress for cloud gaming at MSFT. H████ was on that team and would have a better perspective on why they didn't make more progress.

r██ t██

Yes, I worked with Mr. J██████. He was my GPM and I was dev manager on an early iteration on game streaming.

Smart guy, creative thinker, broad knowledge, **ambitious**, generally easy to get along with.

Ambitious.

Main criticism has just been a few **things haven't been successful**. Stadia, the game streaming, etc.

Not sure why, either startup luck or something with him. I tend to suspect he just reaches for longshots.

reality distortion field ===> lack of judgment
how issues with g█/devmktg

hard to say it's a direct "how" - I think f2f he was always respectful to ppl. unf it was all indirect - channeled through their own Dev Marketing person, and maneuvering to position Stadia as the center of gaming vs. a Google for Gaming mindset. In a sense, it might be not having respect for the opportunity.

G█ H████, 19 min, Edited
I personally felt like I should've bowed out after hearing they thought my title wasn't "big" enough to be part of the keynote
(I heard all this, confidentially, through K███)

----

j███
s██████ etc. black+ retention, rochester
k███ -> LA
r███, boston

[HEARING]
https://docs.google.com/document/d/1ou1HOsAC1okMMVPeLWkwXq8qN6rCH1GgqKi6injTyQ8/edit

T██ L█, 33 min
more seriously, so i can plan a little, how much of my cal do you expect to get detonated for prep?

K█████ G██████, 17 min
My expectation is: a couple of hours this Friday, then 2 half days and one full day next week, then one full day on the Monday before your appearance.

T██ L█, 16 min
and lots of studying ?

K█████ G██████, 16 min
You're going to be well prepped and you're going to be fantastic, btw

K█████ G██████, 14 min
Yes, there will be study as well. But I also see alot of this as your professional sweet spot. This is about digital content distribution at the end of the day, and you're the guy on these issues, with a career spanning so many of the major platforms.
So we'll coach you but also want you to speak with the authority and humility of someone who knows this in and out already

T██ L██, 12 min
appreciate the votes of confidence. do we know who apple is sending?

K█████ G██████, 7 min
Not yet
They suggested a compliance executive /legal rep. Not sure if they'll stick with that. (It's a bad idea for them to go that route.)
Btw, for that meeting tomorrow, it sounds like the RIT team wants to take your temp on some of the non-billing/product/business questions you might get asked, eg Parler.

T██ L██, 5 min
yeah i'll need to get re-read into all those escalations and the decision making/talking points

K█████ G██████, 5 min
Exactly
And for non Play/Android, you will be able to deflect "Yt is not my area", etc

T██ L██, 4 min
who should my primary GAPP/legal POC be in general for this hearing?

K█████ G██████, 1 min
For GAPP, it will be A█ B██████ and F██████ L█████. R██ and I are supporting, but A█ and F██████ are primary POCs. For Legal, it will be L██ K████ and K██ S███. T█████ is supporting, similar to the role R██ and I are playing for GAPP.

—

hearing questions
  -    how much can i use my opinion/experience. e.g. google's privacy focus
  -

get up to speed on io messages

----

what are we cutting from play + foldables
what other options/ dial backs
financial impact of play cuts

—

a█████
[geist]
- core work team / xfn / eng / ux
    - impersonal due to covid
    - work not as fun as it used to be. more transactional
        - inherent fun of building is sapped out of system
        - some teams may depend on the eng mgr, if pm is new, team dynamics are off
            - policy (ex-vlad, now l████)
                - culture is not good, eng lead is passive, super impersonal
        - fun event things are not part of making the work fun
        - 10 person mtg, 3 ppl off mute interrupting each other, 7 others impossible to get involved
            - k███, m██████, s██████, m███ d██████
            - not self aware enough to break out of spiral
        - tooling. too many trixes
    - PA level
        - pain working w android
            - we generally feel less integrated w android, used to be invited to their all hands, was more inclusive, now we never hear anything from android, now only get my passdowns
            - inclusiveness of android org of play is gone. very transactional
        - guidance on when/how to use pps's
        - too many top down xpa initiatives
            - wear
            - android big screen
            - better together
            - runway
        - prioritization, eng promo ladders
        - product vision - whats missing?
            - tldr - we dont hear from s██████ anymore, not as relevant. similar for h██████
                - me/m███ - structure and manner in which vision is conveyed, lack of relevance to local teams work
                    - vision may have to be more of a discussion/dialogue, rather than a presentation
            - AI: quarterly
            -

Redacted - Privilege

Redacted - Privilege

█ convo

T██ L██, 11:48 AM

hey man, long time no talk.....qq....are CN app store fees still hitting the 50% mark? or has that dynamic changed?

L█ Z████, 1:05 PM

Hi T██, in general yes. There were cases where certain developers for certain titles) were able to negotiate it down to lower fee (~30%) but those were anomalies.

T██ L██, 1:13 PM

you have a deck or doc detailing how/why prices escalated so much?

L█ Z████, 55 min

Not exactly what you are asking for, but this might help. I did a brief summary of Huawei app store a while ago, mostly still valid:
https://docs.google.com/presentation/d/1J6GCpxF75Ni4HMKO0ERK9ustATc-vv5J_tmvIIirF_w/edit#slide=id.p

Huawei App Store

Business Analysis

Huawei App Store

What really matters to Huawei store's business is slide 6, Market co-op model 市场联运

And there is link to a Market Co-op Service Agreement, which has a table describing a rather complex revshare scheme

https://developer.huawei.com/consumer/cn/doc/20204#h1-1611915875593-2

For different category of apps/games, Huawei offers different revshare (e.g. edu 20/80, paid 30/70, outside of China 30/70 etc).

But what really matters to their business - F2P games - it is 50:50.

T█ L█, 50 min

thx and i'll study those....but do we understand how/why stores were able to drive fees up that high?

(context: i'm preparing for senate testimony □.)

L█ Z█, 50 min

Aha

L█ Z█, 40 min

Not sure this will help the preparation, but IMO it's simply they CAN, for several factors: 1) they (at least OEM stores) dominate distribution on their devices 2) lack of anti-competitive regulations in China (at least difficult to apply to app distribution given each OEM only owns x% of the market share) 3) complexity of market dynamics - app/game devs are also in dominating position in their respective domains (e.g. Tencent in gaming and social)

The last one might be something helpful?

T█ L█, 38 min

well i guess i'm trying to say ' hey if you open up app stores, you end up with china where the costs are 50%'

but i wanted to see what the driving forces are, sounds like i can't really say it.

L█ Z████, 35 min

Hmmm. I don't think there is a logic between open up app stores -> fee will jack up to 50%, because the primary driver is domination in their respective walled garden.

Maybe on the flip side, we might be able to say, even in a high competitive app distribution environment as in China, fee is still as high as 50%?

T█ L█, 33 min

yeah

L█ Z████, 33 min

Therefore, at least more app store might not necessarily benefit devs in that regard.

L█ Z████, 31 min

But if the hearing committee dive deeper, it's difficult to argue that there is a lot of friction in China, therefore not necessarily a free market.

L█ Z████, 28 min

Well, maybe there is something there

Can we say the existence of Play prevents Android OEM forming app distribution domination in walled garden based on their devices.

We've seen in China, when such domination exists, app distribution fee can jack up to as high as 50%, because Android OEMs want to use this business model to compensate the thin margin of their hardware business (which actually is the root cause to answer your question).

Supporting that argument, most of the top Android OEMs are from China, where they already demonstrated this practice.

And we can check Samsung app store's terms in China too.

T█ L█, 24 min

remind me - are there any non-oem app stores that are 'thriving'? and how much do they charge now?

L█ Z████, 23 min

They are all barely surviving, with the exception of Tencent and Taptap.

Taptap is an interesting one, they charge 0% from dev and adopted a purely ad based model.

T█ L█, 22 min

that's crazy. what does tencent charge?

and how do those 2 appstores get distribution?

L█ Z████, 21 min

sideloaded

I need to check Tencent app store's terms.

Tencent app store (myapp) had a long history, technically it needs to be sideloaded, but that's technical terms, not user acquisition strategy.

L█ Z████, 13 min

Tencent app store's rev share is a bit more complicated, given they are also a publisher (with 50% of the total CN market share by revenue).

On paper, for the most lucrative sector (F2P online games), it says 60:40.

https://wiki.open.qq.com/wiki/%E5%90%88%E4%BD%9C%E6%96%B9%E5%BC%8F

But there is also a footnote says, there is a fixed 25% Android distribution cost, rev share is after that (i.e. on 75% of total spend).

In short, Tencent is robbing developers, as summarized in this article. □

https://xueqiu.com/2919738071/116034659

腾讯游戏的商业模式（转） 一.商业模式 1）合作模式 腾讯游戏分自研和代理两类 而从代理角度而言，又分为开放、联运、独代三种合作模式。1.1）... - 雪球

xueqiu.com

T█ L█, 9 min

so funny. NO default distribution AND they charge more /facepalm

L█ Z███, 9 min

Yep, true capitalism.

I feel the angle of Play preventing OEM store dominating app distribution and jacking up fee as in China makes sense.

T█ L█, 7 min

probably too subtle for committee tho

but i'll note it and see if the hill team wants to use it

L█ Z█████, 6 min

Ok. Btw, the reason why Apple can maintain at 30% is that their hardware margin is much higher than Android OEMs.

Maybe we can also find Xiaomi's ipo prospectus, to see if they state services (primarily store) as a key business model.

T██ L██, 5 min

does xiaomi's store show up in US?

L█ Z█████, 4 min

It should, if we have a Xiaomi overseas device.

T██ L██, 3 min

i mean if i buy xiaomi off amazon, will it have their store?

L█ Z█████, 2 min

I believe it should, but can't guarantee.

https://moma.corp.google.com/person/p█████p█

P█████ manages Xiaomi and should know this better

Btw, he was from Xiaomi

Hope this helps a bit. Good luck with the prep and happy to contribute more.

T██ L██, Now

thx for all the perspective!

L█ Z█████, Now

For sure

--
io
inside android/mobile. privacy/security. wear. samsung/wear
s█████ 4 priorities
- landing io. incl rubidium
- pixel 2021
- wear/r████
- play business model changes/t██ testimony

p██████
- foldables/tablets. starting a weekly pipeline review for app dev efforts
- weekly update on this

running teams - try to have loosely typed set of time dedictead to reviews with teams. can be decision/guidance/whatever.   good notes, good decision log, clear decision makers,

—

1. priroiritze DAU
2. addtl HC, articulate benefit
3. follow up on b*

----

ss█████

hc ask,
[AI]sit w s████ f████, one company decision here. dont want them to think we defaulted, would've liked other teams to act this way, less transactional

b* bits to eap, h█████ update 4/15
- s█████ - next couple weeks. given what we're up against w him.
deals vs b*
#1 goal : daily destination - highest beta, lots of ideas, unclear plan
b* defense - msft, onestore

wfh situation
- pops? P&E wide...
- what will happen to culture if no office?
- google defined by smart ppl, innovation, not the products (diverse hits), mostly deep cs stuff. how much of that are you messing w w wfh
- dont know what you ruin

- world has changed, not founder, wheres signal on where culture will go
-

 YT 'or else' (have to hit 95%, slow analysis, no regression, e█ issues, not steering/leading, feels like only putting ~8 eng);
  - [AI ACCELERATE] easier to react to proposal, or progress/lack of progress

b█ ready;
  - [AI] t█ to try
  - assistant org needs retooling. infra, r&r,
  -
play pass india;
  -
m█ devrel alignment